



No. 02-4

# GAO Technical Bulletin

Arizona Department of Administration ♦ General Accounting Office

Subject: ***Donations of Annual Leave  
between Related Employees  
Working in Different Agencies***

Issued: 08/29/02

Manual Section(s): N/A  
Supersede(s): Technical Bulletin 00-6

Effective: 08/22/02  
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TO: Technical Bulletin Administrators  
Human Resource Managers  
Payroll Managers  
All Agencies

FROM: D. Clark Partridge  
State Comptroller

## **AUTHORITY**

A.R.S. 41-783 Personnel Rules  
A.A.C. R2-5-403 Annual Leave  
A.A.C. R2-5-404 Sick Leave

## **DEFINITIONS**

**Extended illness or injury:** A period of incapacitation for medical reasons, as verified by a licensed health care practitioner, that extends for a period of three or more weeks.

**Immediate family:** Members of one's immediate family include only one's spouse and children (natural, adopted, step or foster).

**Interagency transfer:** A transfer of accumulated annual leave between related employees who work for **different agencies**.

**Intra-agency transfer:** A transfer of accumulated annual leave between two employees, related or not, who work for the **same agency**.

**Personnel Rules:** Sections of the Arizona Administrative Code setting forth employment-related regulations.

**Related employee:** An employee belonging to the same family as another employee.

**Same family:** Two employees are said to be of the same family if the relationship of one to the other is one of the following: spouse, child (natural, adopted, step or foster), parent (natural, adopted, step or foster), brother, sister, grandchild, grandparent, brother-in-law, sister-in-law, son-in-law, daughter-in-law, father-in-law, mother-in-law, uncle, aunt, nephew or niece.

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## **INTRODUCTION**

Laws, 2002, Second Regular Session, Chapter 334, (Senate Bill 1339) amended A.R.S. 41-783 by extending the definition of family to include aunts, uncles, nieces and nephews for purposes of interagency transfers of accumulated annual leave. This technical bulletin and the related Form GAO-209, "Employee Interagency Annual Leave Contribution and Restoration," incorporate the newly extended definition.

## **POLICY AND PROCEDURE**

- 1) Interagency transfers of accumulated annual leave are now permitted.
  - a) Interagency transfers are subject to all the conditions that apply to intra-agency transfers. These conditions are outlined in the Personnel Rules and discussed at length in the Human Resource Management System User's Manual.
  - b) The donor and the recipient must be members of the same family.
  - c) In general, the personnel and payroll procedures are the same as those used in dealing with an intra-agency transfer, except that information concerning the donation has to be communicated between the Payroll Departments of the donor's and recipient's agencies.
  - d) To effect a transfer of hours between agencies, agency payroll offices should use a Form GAO-209, "Employee Interagency Annual Leave Contribution and Restoration" or its equivalent. A copy of this form is attached.
    - i) The donating employee provides the necessary information about him- or herself, the number of hours to be donated, and his or her relationship to the recipient.
    - ii) The Payroll Department of the donor's agency computes the dollar value of the donation and forwards the information to the Payroll Department that employs the recipient.
    - iii) The Payroll Department of the recipient computes the hours to be credited to the recipient's sick leave account based upon the dollar value of the contribution.
  - e) Donated leave that is not used must be returned to donors in proportion to their contributions. The Payroll Department of the recipient's agency may use the bottom portion of the GAO-209 or its equivalent to notify the Payroll Department of the donor's agency of the return.

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- 2) Recipients of **both** interagency and intra-agency transfers are limited to accepting and using no more than six consecutive months (calculated from the perspective of the recipient) of contributed leave per occurrence. If, within this six-month period, the recipient has filed for long-term disability, he or she may continue to use donated annual leave until the recipient's application is approved or rejected.

## **ON-LINE AVAILABILITY**

Copies of this and other Technical Bulletins are available for viewing and downloading from the Technical Bulletin Page of the General Accounting Office Website located at:

**<http://www.gao.state.az.us>**

## **SUPPLEMENTAL MATERIALS**

An updated version of Form GAO-209, "Employee Interagency Annual Leave Contribution and Restoration," can be found on and downloaded from the Online Forms Page of the GAO Website.

## **AREAS IMPACTED**

All State Service Agencies.

## **CONTACTS**

If you have any questions concerning this Technical Bulletin, please contact your GAO Liaison. You may also e-mail questions or comments concerning State policy and procedure to us at:

**[gaopolicy@ad.state.az.us](mailto:gaopolicy@ad.state.az.us)**